

Beyond Points & Badges: How Gamification Can Drive Business Objectives in Your Community



HIGHLIGHTS

Ted Hopton & Tracy Maurer, generously share the results from the implementation of gamification into their employee community. While their case study explores an enterprise, employee focused community there are many takeaways for members managing any kind of community and interested in learning more about gamification. The highlights of the discussion are noted below:

Ted shared that, in his experience with gamification implementation, he has learned the following:

1. It is important to set point values logically and carefully
2. It is vital to categorize the raw data
3. Look at trends and the percentage change to detect meaning
4. Compare the data to community metrics

When launching a gamification system it is imperative to keep in mind the risks associated with introducing extrinsic motivation, especially if the community already has people who contribute well solely based on intrinsic motivation. You do not want to deter those who are intrinsically motivated. Therefore, gamification experts recommend staying away from monetary rewards and/or monetary prizes. Ted and Tracy have had to work hard to convince management to avoid converting points to monetary rewards.

SPEAKERS

Ted Hopton, Tracy Maurer

COMPETENCIES

Community Management

MATURITY PHASES

CMM1, CMM2, CMM3

OVERVIEW

UBM Community: Ted and Tracy's community is an internal community that was launched back in 2008. This is the Company's only common corporate platform.

Business Problem: Tracy explained that they were unsatisfied with the out-of-the-box point system that came with the Jive platform. They wanted a better way to track and reward participation in the community. With that they needed the ability to dive deeper in order to track specific behaviors in more depth. The idea was to be able to readily understand where the activity was occurring within the community, who was responsible for that activity and how they would be able to encourage more of that type of behavior in other areas.

Selling Gamification: Fortunately, there was not a need to convince anyone internally of the need to buy the extra gamification module from Jive or pay for the extra features. Management had actually been requesting various gamification functionalities. That, coupled with negotiations for a new contract and available budget dollars, enabled them to purchase the module. The biggest challenge was to warn management that in order to deliver the kinds of results that they wanted to see, management would need to take the time to write the requirements so that there were actual goals to meet.

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Set Goals for the Gamification Program: Any gamification program should have organizational and/or community goals attached to it in order to ensure its effectiveness. With that in mind, Tracy shared the three goals that were set for their gamification program, as well as how they chose to address these goals:

1. To Increase Engagement: At this point in UBM's internal community history, the community had been in place for almost five years. They needed to infuse more excitement and enthusiasm back into the community, as well as their support team. The hope was that by making the system live and switching up the ways that the points appeared in the community it would spark new activity.

Approach: Tracy and Ted took the time to decide upon the most effective approach for increasing engagement:

Define Behaviors: The first step was to define the behaviors that they wanted to drive and, in doing so, decide upon the types of activities that they wanted to accentuate within the community. For example, they did not want to give people points for simply liking something within the community. That was not the type of behavior that they wanted to emphasize because people would take the easy way out if given the opportunity.

Set Gaming Levels: As with any gamification system, levels needed to be set. These levels needed to be universally recognizable, given that it was a global community. They also wanted to give it graphical appeal, even in those visual areas where the images would be small. Therefore, they used the martial arts belt system.

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Results: Tracy shared the following results:

The first result was to pique interest within the community. People began paying attention to the community again and began seeing things from a new perspective. The reason that Tracy would not consider it a huge success is that the timing was off. They launched shortly after upgrading to Jive6 and it was summer vacation. Therefore, in terms of measurement, it was difficult to determine its impact. Needless to say, regardless of when this type of rollout occurs or how it is planned, there will always be uncontrollable situations that affect the outcome. These incidents will be outside of anyone's control. There is always a reason to wait or to be better prepared, but do not let that be a reason to procrastinate; there is no perfect time to do it.

The second result was increased competition. People began actively seeking out ways to earn points. They even inquired about badges, although badges were not implemented right away. However, since people could see that the possibility existed, they began paying more attention to what Tracy and Ted posted, which was a worthwhile outcome.

2. To Upgrade Communication: Another goal was to be able to stand out and catch the attention of others when it came to upgrading internal communication. Ted and Tracy wanted to ensure that people knew about the upgrade before it occurred so that they were not caught off guard. They also wanted to make use of the new features that were available. Finally, they wanted to learn how to use their gamification platform to its fullest extent.

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Approach: The first step in Tracy and Ted's plan was to set-up missions to ensure that people paid attention to the upgrade and understood what was coming their way. Their approach was to plan a week's worth of daily pre-launch missions. Each mission had a challenge for the members to complete. At the end of the week if all challenges were achieved, they would earn a badge. For example, some of the challenges were to rate various features (which encouraged the reading of content). They also asked people to share the content and utilize other people's networks. The final mission was an Easter egg hunt type of mission. This encouraged people to problem-solve as to how to use the various features within Jive so that, in the future, there would be less dependence on the support team. This gaming feature taught people how to do things for themselves within the system.

Results: Tracy feels that this was the best communication upgrade that they have ever launched. The people who got the message also largely participated in the missions and they learned about the new features. They talked about them. They shared publically what they thought about them. After they actually used the features, they talked about how these features worked for them and how excited they were about it. This was incredibly rewarding for Tracy because of the feedback she received and the fact that people were actually taking the time to read the documentation that she posted. There was also anecdotal evidence of increased excitement and enthusiasm in offices around the company. People were talking about the upgrade and talking about these new features and that is not typical behavior in the launch of a new upgrade.

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3. To Increase the “Jive for Office” Usage: At the same time that UBM implemented gamification, they were also fortunate to be able to add a new feature within Jive called: “Jive for Office”. This feature facilitates file collaboration on Word, Excel and PowerPoint, which was a feature wanted by employees. Honestly, Tracy thought that the uptake would be easy given the desire for the feature. However, that was not the case. Initially, less than 1% of employees were using the feature four months after launch.

Approach: To increase usage, the badge for this mission was both less and more complicated. They could not automatically award a badge for using the tool because most of it was done in the Office product suite and not in Jive. Unfortunately, there was not a way to hook it all up and make it magically happen. Therefore, they created a quiz in an Excel spreadsheet. They provided ample instructions, complete with screen shots, and asked people to create their own version of the document with the answers included. Afterwards, they could then upload that document using the Jive for Office tool in order to share their answers only with the support team vs. publically. Tracy then manually awarded the badge. Once a day she reviewed the system logs to see whether or not anyone had downloaded the software. She checked their answers and if it all matched up, she awarded the badge.

Results: In the first month of the mission, they experienced a 50% uptake in the use of that particular plug in. It did level off significantly, but they have continued to enjoy increased headway after that mission and definitely more than they had previously. It was not as dramatic as Tracy had hoped, but it was certainly better than it was previously. Every time Tracy reminded people of the deadline for submission, there was a brief surge in interest. As an added tactic, Tracy will also close the contest and bring it back once or twice a year to renew interest.

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Establish the Foundation of the Points System: This is the first analytical challenge of gamification since it is the foundation on which everything else is built. Therefore, Ted explained that he puts a great deal of thought and time into this step to ensure that it is defensible. Consequently, he felt that the out-of-the-box point system in Jive was limited and difficult to justify. However, the Bunchball module for the upgraded Jive version is quite flexible. That meant that Ted could look at the types of behaviors that he wished to incent and reward accordingly.

Ted explained that as he was working with the different scales and numbers, it quickly became clear that it is the relative value of each behavior that matters. The absolute value does not matter because there is no value to any of the points; they are not tied to money or job performance or an objective. It is merely an economy that the game master can create. Therefore, once you start thinking of it as an economy, it becomes very easy to be flexible.

Ted stated that he felt uncomfortable simply just assigning points because he thought they should be worth “X”. Instead, he wanted something that he could defend. Therefore, he worked with various mathematical formulas until he found one that he liked.

Ted’s formula is “business value squared times difficulty”. The idea is to rate each activity so as to trigger the system. Taking a blog post as an example, Ted looked at the business of that on a scale of 1-5 with 5 being the highest. He also looked at the difficulty associated with publishing a blog post. It takes effort, so he rated that highly on the scale with a three. Clicking the “like” button is low on the difficulty scale, so that is only a one.

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He went through every single trigger and assigned the UBM business value to it and the difficulty and effort involved. Once that was decided, the math formula above was calculated, which is how they arrived at their point system.

When this exercise is complete, you can step back and assess what makes sense or what looks out of place and adjust accordingly. However, the main point is that Ted is able to justify every point value and defend its worth.

The next step is to set daily limits. They did not do this initially, but quickly saw that some triggers were getting quickly out of control. Therefore, Ted would encourage management to add daily limits by assessing the business value of people performing any given activity in a single day. Adding point limits was absolutely essential to keep people from being tempted to do things that did not make business sense. They have had only one cheater so far, who was caught after downloading the same document 400 times in one month. The document had not changed since the year before, so this person had no excuse for this behavior.

Hillary asked if employees know the formula or if it is hidden from them. Ted stated that he has explained the formula, but he does not feel that the average employee could repeat it. They were certainly open about communicating how many points would be awarded for each action and how they were weighted, but he did not spell out the exact formula for each trigger.

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Take the Time to Reflect on Your Gamification Efforts: Tracy believes that it is a best practice to reflect and compare the different missions that have been set up for the different games. Analyze what when wrong and what went right. Tracy did that when preparing this presentation for JiveWorld and it helped her to pick up on some lessons learned (such as recognizing that August is not the time to launch a mission). Recognize that you will not always win, but that is not a good reason not to try. Learn from your mistakes.

Understand How to Analyze the Rich Data Provided by Gamification: Ted explained that effective measurement is required for a successful gamification effort. It is important to measure what is going on so that you can learn and understand the data, especially because the data is so incredibly rich. Ted feels that, in fact, you can learn more through gamification than you may otherwise learn through any other method.

Categorize the Data: This is the first step. UBM has several triggers in their system and the reports will give data for every single trigger. Trying to understand what is going on in your community by looking at that level of data is very much like trying to understand your household spending by looking at your banking and credit card records for the last few months. There is so much detail that it will be impossible to make sense of it unless it is categorized into different kinds of spending. Therefore, Ted categorized the data into different action-type categories. Two important categories that he uses are contribution and curation (which are rewarded accordingly). Two other categories are participation and reaction to actions in the community. By placing activities into these action types and condensing and simplifying the data, it tells a story

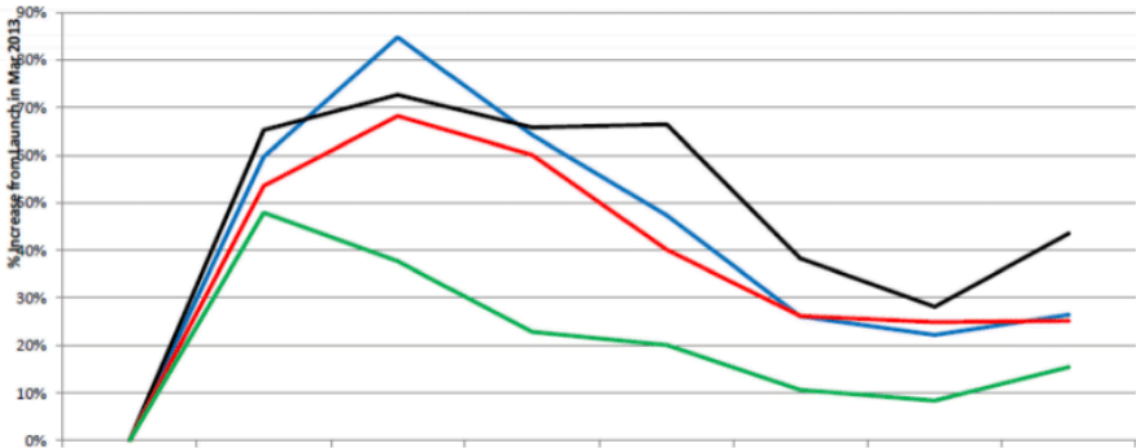
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For example, if you take those four categories and plot them on a chart that compares these categories to a base line, much can be learned, as demonstrated in the slide



% Growth in Activity

Increase in Gamification Activities / Member Since Launch



	Mar 2013	Apr 2013	May 2013	Jun 2013	Jul 2013	Aug 2013	Sep 2013	Oct 2013
Curation	0%	60%	85%	64%	47%	26%	22%	26%
Contribution	0%	65%	73%	66%	66%	38%	28%	44%
Reaction	0%	54%	68%	60%	40%	26%	25%	25%
Participation	0%	48%	38%	23%	20%	11%	8%	16%

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This chart shows that people are taking to the system. In May they peaked at amazing levels, followed by a downturn in August and September and then a rise again.

These are incredibly positive results. It demonstrates how gamification was able to influence people's actions. At UBM, if you give people points for doing things – and it is just points; there is no money attached to it – they respond. They are competitive, they enjoy the game and they will do things differently as a result of that motivation.

The key point here is that without measurement, you are only guessing. When you create these missions or the point levels or the point systems, it is just a guess as to people's actions. Unless you actually measure what people are doing, you are not being effective.

Community metrics should also be analyzed to investigate how they are changing and how they are being influenced by the system. Indication is not an end in itself. The object is to improve the community and make things happen.

Histograms are great tools. Ted shared that they help to give him an idea of how many points people are earning each month. It will show the concentrations, i.e. those who are earning less than 100 points each month. Ted explained that, for him, this was a total disconnect from what he had envisioned would happen across the organization. The levels were set intentionally so that people would, every few months, get the dopamine rush of reaching a new level. However, at this rate individuals would reach a new level every 2.5 years. This told Ted that he needed to put something else in place. He does not have the answer yet, but it is important that he at least got the message – which might not have been the case without the analysis of gamification data.

LESSONS LEARNED

With respect to setting levels in the gamification system, Hillary asked Tracy if they tested any of the symbols before rolling out the program. Tracy responded that they did not, other than to test the interface within their IT environments to ensure that they worked and looked appropriate. They had the perspectives of their community managers in Asia and the UK, so there was global input. However, it was not a formal process across the organization to ensure that everyone would understand it.

Tracy shared that it is important to keep an eye out for people who may try to game the system, but take the time to ensure that you are not jumping to conclusions. Sometimes, having this added depth and richness provided by gaming may actually expose new ways that people are using the system. This may be in respect to posting content, as well as consuming content. These perspectives may not have otherwise been realized. Therefore, it is important to understand what is going on before jumping to conclusions.

Tracy stated that in a rollout like this gamification rollout, it is a reminder that people do not read. They do not read instructions, they do not read answers to questions that they have posted, and they do not read answers to their questions about the answers. Therefore, it is important to have pre-prepared answers to repeat questions. Also, be firm with people that it is important for them to take responsibility for finding the answers (in this case, it was part of the game). Some people will be relentless, so it is a good idea to plan in advance how to deal with it.

As another lesson learned, Tracy stated that some missions will take more effort than others, so it is important not to rely on just the game mechanics. Gamification and awareness campaigns will also be needed. As well, encourage sharing and see where that can be incorporated and added to the point system. If the mission is long-running and periodic, constant sporadic communication is needed to sustain the interest level. People cannot be expected to remember it long term. You will need to remind people and get their attention in different ways.

Analysis and planning will not prevent mistakes or unexpected results. You will need to be ready and willing to adjust the rules and adjust measurements. Advise people upfront that that is your plan so that they are not caught unaware. Perhaps you can even encourage suggestions for improving the game.